# How to Run Reports and Queries HRIS 8.3

## *Overview*

HRIS 8.3 runs both reports and queries to web based applications.   The output may be printed or saved to the user's desktop according to the output selected at the time the report or query is run.

**SQR and Crystal** – There are two primary Report types, SQR and Crystal.  Both report types 'print' the output to Adobe Acrobat.  Hardcopies can be reviewed and printed from there.

**Queries** – Always output to an html version of Excel.  Users should use the .CSV format to save the query output to their desktop.  This file should be opened with Excel – the data will automatically parse the data into the worksheet.  Note:  Data formats for numbers (including emplid), date, time, and dollar values will need to be formatted.  This version of query-excel does not impose standard formatting on the exported data fields.  Tips on formatting output in Excel are included in this section.

For Assistance with Reports and Queries, send email to HRIS@lbl.gov

## *How to Run a Report*

### Run Control ID

When you want to run a report or process, you need to tell the system when and where you want it to print.  For most reports or processes, you also need to set parameters that determine the content of the report, such as the business unit or time period on which to report.

A run control is a database record that provides values for these settings. Instead of entering the same values each time you run a report, you create (and save) a run control with those settings. The next time you run the report, you select the run control, and the system fills in the settings.

A run control is created in "Add" mode and is saved when either the save button is pressed or when the selected report runs successfully.  Once you create a run control id you should always use the same one.

### How to Run an SQR Report

1.  **Select the Report** you wish to run (update display mode)
2.  Enter a **Run Control ID**
3.  Enter **Parameters** or skip to step 4
4.  Click the **"Run" button**
5.  Select Server Name: **PSUNX**
6.  Select Type: **Web**
7.  Select Format: **PDF**
8.  Click **OK**, the report will "process"
9.  To view and print the report, Click the **Process Monitor link**
10. Click the **"Refresh" button** until the Run Status is **"Success"**
11. Click **Details link**
12. Click **View Log/Trace link**
13. Click  **the \*.pdf file link (the name will consist of the file name and run instance #)**

14. **View** and **print** report from Acrobat .pdf file

## How to Run a Crystal Report

1.  **Select the Report** you wish to run (update display mode)
2.  Enter a **Run Control ID**
3.  Enter **Parameters** or skip to step 4
4.  Click the **"Run" button**
5.  Select Server Name: **PSNT**
6.  Select Type: **Web**
7.  Select Format: **PDF**
8.  Click **OK**, the report will "process"
9.  To view and print the report, Click the **Process Monitor link**
10. Click the **"Refresh" button** until the Run Status is **"Success"**
11. **Click Details link**
12. Click **View Log/Trace link**
13. Click  the **\*.pdf file link (the name will consist of the file name and run instance #)**
14. **View** and **print** report from Acrobat .pdf file


## *How to Run a Public Query*

### Accessing the Query Manager
**Roadmap**

Home > PeopleTools > Query Manager > Use > Query Manager

### How to Run an Existing Query without 'opening the query'

1.  **Search for the Query** you wish to run

- Enter a partial query title and click the Search button (use wildcard, see Appendix A)
- Leave search criteria blank to view all available Queries

2.  Click **Search button** to list available Queries
3.  Click the **Run link** on the row for the title you which to execute, a separate IE window will open to display the prompts and results.
4.  Enter **Prompts if applicable** and Click the View Results button.  If the query has no prompts your query results will be displayed.
5.  Results will display in IE html page.  Data can be viewed or downloaded to your desktop.
6.  To down load to Excel –**Use the "CSV Text File" link**.  Do Not use the "Excel Spreadsheet" link.

- *CSV Text File link* creates a simple text file that is automatically opened in Excel and easily formatted
- *Excel Spreadsheet link* creates an excel file with very unfriendly formatting.  Not recommended.

7. Save the CSV file to your desktop, rename if desired.

8. Double click the CSV file on your desktop and the file will open in Excel. Format the file as needed. See Query Excel formatting tips listed a below.

9. To exit the query, Close the Query – Results IE window.

10. To run a new query, Activate the Query Manager IE window, it should still be open but minimized.

> NOTE: A query must be "SAVED" before it will run. If you edit any part of a query you must first save it before running.

## Tips on formatting your Query Output

1) When you first open the CSV file, always format the spread sheet ad save.

   a) Select all cells in the spreadsheet using the top left cell.       Hot Key: Ctrl-A
   b) AutoFit the column width – Format, Column, AutoFit Selection.    Hot Key: Alt-O,C,A
   c) Left Justify all columns – click the Align Left tool bar button
   d) Change the .CSV format of the spreadsheet - Save your CSV file, edit the "Save as type" to be Excel Workbook, Click OK.

2) Use Excel's Format, Cells menu option to standardize field by column. Fields that we suggest formatting are: Numbers (including emplid), Dates, and Time.